Executive summary

In Spring 2004, several DRCIG members began discussing the prospect of a UC-wide chat reference pilot project. A subgroup met in October 2004 and established the following goals for a chat reference pilot: to provide excellent service; to add a service point; to extend reference hours; to show the value of a collaborative reference service; and to determine the usefulness of chat reference to the participating libraries.

Patrons at UCI, UCLA, UCM, UCR, UCSD, and UCSB could ask librarians for assistance via instant messaging software (24/7 Reference). The service originally ran from January 9, 2005 through March 24, 2005 from 6-9 p.m. Sunday through Thursday, but service was extended through June 9, 2005.

The 24/7 software allows the patron to chat with a librarian, to send and receive web pages, to co-browse web sites with a librarian, to receive a transcript of the session, and to provide feedback on the pilot through a web survey. There is a high level of satisfaction reported: 81% of respondents stated they received all the information needed and 16% said the information was helpful. The reason most often cited for enjoying the service was the ability to get an answer quickly.

In a survey sent to participating librarians, 100% of respondents found collaborating with other UC librarians to be a very valuable experience. 20% agreed that the service patron's received was excellent and 80% somewhat agreed. The biggest challenge to providing excellent service seemed to be in learning another library's services and web sites.

Through the chat service, participating campuses have extended their evening service hours. The service was open for a total of 165 hours Winter Quarter. The pilot added a service point for UCR, UCSD, and UCM. These campuses are new to chat, but found students using it at nearly the same rate as campuses with an established service. See the table below for details.

Table 1: Number of chat transactions, by campus

Campus	Number of Calls	Percentage, by campus
UCI	93	28%
UCLA	69	21%
UCM	1	0%
UCR	74	22%
UCSB	36	11%
UCSD	61	18%
Total	**334**	**100%**

Collaborating to provide chat reference service is not only popular with the participating library staff and patrons, it is cost effective. Our collaborative pilot leverages many existing collaborations between UC campuses such as Tier 1 databases subscription, the Melvyl Catalog, interlibrary loan/request services and UC-eLinks, while adding the benefit of fewer virtual desk hours per participating library.

Primary Recommendations

The Digital Reference CIG subgroup has evaluated the pilot, found it to be successful.
- The DRCIG subgroup recommends that HOPS approve the service for permanent status beginning Fall Quarter 2005.
- HOPS should provide support for the formation of a UC-wide chat reference collaborative and encourage participation from every UC campus. Interested campuses should be able to join the collaborative in phases, as they are prepared to do so.
- Software costs should be shared among participating campuses. The new pricing structure for Question Point – 24/7 (OCLC) Reference software rewards collaborative service models by providing sliding scale prices based on the number of campuses involved in the planned collaborative. Details on the pricing are in Appendix D of this report.

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Final Report

I. Introduction and Project Overview:

In Spring 2004, several DRCIG members began discussing the prospect of a UC-wide chat reference collaborative. We recognized that there were hurdles; among them, software inadequacies, and staffing challenges, but several campuses wanted to move forward with an experimental chat reference collaboration. In order to do so, UCI volunteered to provide chat software access, training and staffing. Several other campuses (UCLA, UCM, UCR, UCSB & UCSD) volunteered to staff a pilot chat reference service.

This DRCIG subgroup met in October 2004 to set the pilot goals, establish guidelines, designate service hours and resolve all of the details necessary to begin offering a chat reference pilot. The goals are listed below, with the predetermined evaluation measures included:

1. Provide excellent service to our users. Measures:
   a. Use a brief pop-up survey at the end of each chat transaction.
   b. Include a question within the pop-up survey asking volunteers to participate in a follow-up survey or interview.
   c. Analyze chat reference statistics and look for figures similar to those achieved at campuses with established chat reference services.
2. To add a reference service point that reaches users outside of the physical libraries and adds a service point at UCs who do not currently offer chat reference. Measure:
   a. Activity on campuses without an established chat reference service will achieve this goal.
3. Extending reference service hours. Measures:
   a. Activity during the pilot hours (6-9p.m.) will achieve this goal.
   b. Current reference hours and pilot extension comparison:
4. To show the value of collaborative reference service. Measures:
   a. Survey the librarians answering chat reference questions to determine their level of satisfaction and perceptions of the pilot.
   b. Establish a successfully method for question referrals and UC-wide reference training.
   c. Evaluate the cost effectiveness and staff efficiencies.
5. Prove that the chat reference collaborative concept can be successful and advantageous.

The pilot took place from January 2005 – June 2005. Initially, the pilot was to span only 10 weeks, but later it was extended to June 9, 2005. Each campus took a weekly evening shift, Sunday through Thursday, 6 p.m. to 9 p.m. Most of the campuses staffed evenings with a single librarian monitoring chat reference questions for all of the campuses, though some double staffed their shifts.

The pilot subgroup created guidelines (http://lib.ucr.edu/UC_dref/index.php) and campus policy manuals (http://lib.ucr.edu/UC_dref/index.php) to help answer patrons' frequently asked questions as well as provide easy access to the most commonly used online materials (e.g. online catalog, A-Z list of articles databases.) Additionally, a listserv was created in order for the participating librarians to share their experiences and to communicate any possible issues or suggestions with each other.

II. Pilot Results and Statistics:

The first 11 weeks of the pilot ran from January 9, 2005 – March 25, 2005. In that time, we conducted 334 transactions. Here is a breakdown of the calls by week and by campus:

Week of the Winter 2005 quarter:	1	2	3	4	5	6	7	8	9	10	11	Totals
Calls by Campus:												
UCI:	2	2	8	7	15	7	13	14	12	3	10	93
UCLA:	3	1	2	5	4	7	6	5	11	20	5	69
UCM:	1	0	0	0	0	0	0	0	0	0	0	1
UCR:	2	7	7	10	11	10	3	6	12	5	1	74
UCSB:	4	4	8	2	5	1	3	4	5	0	0	36
UCSD:	11	3	20	3	3	3	1	6	7	3	1	61
Total Calls:	23	17	45	27	38	28	26	35	51	31	17	**334**

Vital Statistics:	
Hours open	165
Transactions	334
Average transactions per hour	2
Average call length	10:01:28
Median call length	7:08:48

Calls by Day	Totals	Rank
Sun	40	5
Mon	90	1
Tue	57	4
Wed	82	2
Thurs	65	3
Total Calls:	334	

The average transactions per hour may seem low at first glance. However, it is an average for the entire Winter 2005 quarter. As can be seen above, usage in the middle of the quarter was much heavier than in the first or the last weeks.

The average call was about 10 minutes long and the median call length was around 7 minutes. These calculations include 19 anomalous calls that were over one hour, in most cases, because the call was not closed successfully after the patron's question had been answered. Although this isn't a common problem, there are times when network speed and computer memory can interfere with the server connection, causing this problem.

III. Results
1) Provide excellent service to our users.
   Measures:
   a. Use a brief pop-up survey at the end of each chat transaction. (See survey, Appendix A)
      Results:
      We received 32 completed user surveys. That is a 9% response rate. The results were overwhelmingly positive with 81% (26) rating service quality as "All the Information I needed", 16% (5) "helpful, but not complete" and 3% (1) "Not helpful at all". Ninety-one percent (29) of respondents felt the service hours were sufficient.

      User survey comments were wide ranging. When asked what they liked most about the service, 34% responded that they appreciated the ability to get an answer quickly (e.g., "I liked receiving the information extremely quickly", "prompt response", "time saving", "quick".)

      When asked what they liked least, 69% of respondents left the field blank or indicated "no complaints" or "nothing."

   b. Include a question within the pop-up survey asking volunteers to participate in a follow-up survey or interview.
      Results:
      Several patrons volunteered to participate in a follow-up survey. Because our user surveys were overwhelmingly positive, we determined that any follow-up survey or interview with these patrons would have a positive bias. Therefore, we did not pursue follow-up surveys/interviews.

    c. Analyze chat reference statistics and look for figures similar to those achieved at campuses with established chat reference services.
       Results:
       The pilot activity exceeds chat reference activity on UC campuses that have established chat reference services because more campuses were served simultaneously. The pilot service averaged 2 transactions per hour while the established services averaged significantly less. We also compared statistics for the 6-9p.m. shift we offered to other campuses that provided chat service from 6-9p.m. in previous quarters. Prior to Fall 2004, UCLA provided chat reference from 6-9p.m. and received 2.8 calls per hour in the Spring 2004 quarter. The 6-9p.m. time period appears to be a particularly popular time slot for chat reference.

	Quarter	Calls per hour
UCI	Fall 2004	1.1
UCLA	Fall 2004	0.72
UCLA	Spring 2004, 6-9p.m.	2.8
UCSB	Fall 2004	0.34
Pilot Collaboration	**Winter 2005**	**2.0**

6. To add a reference service point that reaches users outside of the physical libraries and adds a service point at UCs who do not currently offer chat reference.
    Measure:
       Activity on campuses without an established chat reference service will achieve this goal.
       Results:
       Several campuses involved in this pilot do not currently offer an alternative chat reference service: UCSD, UCR and UCM. Of these three campuses, those with significant enrollment figures showed significant activity – especially when compared to campuses with established chat reference services (UCI, UCLA and UCSB.) UCR and UCSD accounted for 22% and 18%, respectively, of the total chat transactions during the pilot.

Calls by Campus:	Totals	Percentages
UCI:	93	28%
UCLA:	69	21%
UCM:	1	0%
UCR:	74	**22%**
UCSB:	36	11%
UCSD:	61	**18%**
Total Calls:	**334**	

7. Extending reference service hours.
    Measures:
       a. Activity during the pilot hours (6-9p.m.) will achieve this goal.

       Results:
       Extending reference service hours can be done in many ways, however, the true test of success for any new service is whether or not patrons used it. As you have seen in the charts above, 334 patrons took advantage of the extended service hours we offered. We were able to assist 334 patrons over the course of the 10 week pilot who may not have asked for assistance otherwise.

b. Current reference hours and pilot extension comparison.
Results:
We were able to either extend or add reference service hours for every campus involved in the pilot.

Campus	Physical Reference	Existing Chat Reference	Pilot Chat Reference
UCI	M-Th until 9pm Sat/Sun 1-5pm	Open until 6 p.m.	**Extends chat reference hours.**
UCLA	M-Th until 8pm, Sat/Sun 1-5pm	Open M-Th 11-6, F 11-5	**Extends evening hours.** **Extends chat reference hours**
UCM	None.	None.	**Adds reference hours.**
UCR	M-Th until 8pm, Sat/Sun 1 – 5pm	None.	**Extends evening hours.** **Adds chat reference hours.**
UCSB	M-Th until 12am, Sat until 9pm, Sunday until 12am	Open until 5 p.m.	**Extends chat reference hours.**
UCSD	M-Th until 8pm, Sat/Sun: 11 - 5pm	None.	**Extends evening hours.** **Adds chat reference hours.**

8. To illustrate to our colleagues the value of collaborative reference service.
   Measures:
   a. Survey the librarians answering chat reference questions to determine their level of satisfaction and perceptions of the pilot.
   Results:
   At the end of the first 11 weeks of the pilot, we surveyed our fellow chat reference librarians (Appendix B) concerning their perceptions of chat service quality, the value of collaborating with their UC colleagues, and general suggestions about possible improvements for a collaborative chat service.

   Five of the eight librarians staffing the chat pilot (not including the CIG members) answered the survey. Of those 5, 100% said they felt the pilot was a valuable experience. When asked about the quality service provided and whether it was "excellent", 80% (4) answered "somewhat agree" and 20% (1) "strongly agree." Additional comments concerning the quality of service revealed one common theme: It was challenging to answer campus policy questions for other campuses that they normally answered from memory, or "knew in my head" as one librarian explained, concerning their own campuses. Others noted that some chat reference questions are simply better answered in person. Other noted that some chat reference questions are simply better answered in person.

   When asked what they would change, one librarian suggested we "get more people involved." The other 2 answered involved specific suggestions for software improvements which are unavailable from any chat software package at this time.

   Finally concerning the overall success of the pilot, 3 librarians described what they found most successful:

   -"the collaboration between the different librarians and the weekly updates."
   -"Getting feedback, when needed, from our colleagues"
   -"hearing how other librarians handle questions."
   -"Learning new things"
   -"Providing this service in the evening"

   b. Establish a successful method for question referrals and UC-wide reference training.
   Results:
   Although we developed a method for handling referrals there were very few instances when such a

referral was necessary. Occasionally, referrals/follow-up from the home campus was necessary, but more often the patron was referred to a campus service point where they could follow-up independently. In fact, patrons often declined a direct referral to the reference desk (if the desk was still open at the time) preferring to pursue the suggestions provided by the chat reference librarian.

When a referral was necessary, the home campus received the referral and successfully completed the transaction via email.

c. Evaluate the cost effectiveness and staff efficiencies.
Results:
Collaborating to provide chat reference service is the most cost effective method for libraries that have decided to provide chat reference service. You can rely on (and pay) 1 person to receive and answer questions that originate from several unique campus services. Our collaboration pilot could also rely on the many existing collaborations between UC campuses, such as Tier 1 database subscriptions, the Melvyl Catalog, interlibrary loan/request services and UC-eLinks.

Software costs can be shared among participating campuses (during our pilot, there were no additional software costs because UCI had permission from 24/7 Reference to allow the other UCs to user our software subscription temporarily.) The new pricing structure for Question Point – 24/7 Reference software rewards collaborative service models by providing sliding scale prices based on the number of campuses involved in the planned collaborative.

NOTE: The Question Point - 24/7 Reference software works as well as other chat reference software currently available to libraries, however, it does require that campuses using Windows XP use a different version of java than comes packaged with XP. This is a relatively simple problem to overcome although not ideal. The libraries new to chat reference reconfigured their local workstations properly so their librarians could monitor the chat service successfully.

For campuses without an existing chat reference service, there will be initial costs. However, a collaborative service model is the most cost effective way to begin offering chat reference, as well as to extend your library's reference service hours.

NOTE: Several librarians provided reference service from their homes (UCLA, UCM and UCSD.) It worked well because chat reference service does not require access to print resources. As UCI, UCLA and UCSB have discovered while providing chat reference, when a print source is required, the librarian on duty uses the online library catalog to show the patron how to access it.

9. Prove that the chat reference collaborative concept can be successful and advantageous.
Results:
The DR CIG believed achieving the preceding goals would prove the collaborative concept was successful and advantageous.

IV. Conclusions
It's important that the reference service we provide, whether in person or through online chat, be excellent as well as satisfy the patrons' needs. Both the librarians providing service and the patrons who completed user surveys agreed these goals were achieved.

It was puzzling to see the high percentage of librarians who answered "somewhat agree" when asked about chat reference quality. This may be due to the difficulty answering local campus-specific questions. The CIG understood how difficult it would be to answer such questions. We created an online manual for each campus so commonly requested information would be easily accessible. Another possible reason is the inability to answer chat reference questions to the same extent as we are accustomed to answering in-person reference questions. The CIG believed chat reference questions would sometimes require referrals to the patron's home

campus for a complete answer or face-to-face consultation. Therefore, we created a question referral procedure; however, there were very few referrals. We concluded that chat reference service cannot always provide the same level of service as in-person reference service. In some cases, we must do our best to satisfy patron expectations instead of our expectations about what constitutes "quality." After all, even though our librarians only agreed "somewhat" that they were able to provide excellent service, 81% of patron survey results indicated they received "all the information [they] needed."

To address these concerns, the DR CIG recommends that any collaborative chat reference training program include:

A. an in-depth exploration of each campus online manual (http://lib.ucr.edu/UC_dref/index.php) and library web site.
B. a thorough review of sample chat transcripts that help to illustrate when an in-person referral is appropriate.

With very little marketing the pilot received an average call volume higher than other UC campuses with established chat reference services. Because of the significant number of questions received during the chat pilot, we recommend any UC chat pilot service include evening chat reference hours. The CIG put together a marketing plan to guide campuses without an established chat reference service. (Appendix C)

We were able to either extend or add reference service hours for every campus involved in the pilot. In addition, patrons from UCSD and UCR (campuses without existing chat reference) accounted for 40% (UCR, 22%; UCSD, 18%) of our chat reference calls. In a very short period of time the patrons on these 2 campuses learned about the chat reference service and began to use it showing there is interest and understanding of chat reference on other campuses.

Collaborating to provide chat reference service is the most cost effective method for libraries that have decided to provide chat reference service. Software costs can be shared among participating campuses.

V. Recommendations

1) HOPS should provide support for the formation of a collaborative UC-wide chat reference collaborative for permanent status beginning Fall 2005 and encourage participation from every UC campus. Allow campuses to join the collaborative in phases as they are prepared to do so.
2) Because of the significant number of questions received during the chat pilot, we recommend any UC chat pilot service include evening chat reference hours.
3) Although the Question Point – 24/7 Reference software requires some local software configuration the CIG recommends any UC-wide chat collaborative use this software. This software is used currently to provide chat reference at UCLA and UCI. (UCSB uses the tutor.com chat reference software which uses the same underlying software, eGain, and is nearly identical.)
4) CDL should pursue a tier 1 software subscription that would allow every UC campus to use the software independently or as part of a UC-wide collaborative. Current Question Point – 24/7 Reference software costs could be as high as $8250 (software, local server and 1 librarian login/seat) or as low as $500 (shared software and 1 librarian login/seat.) (See Appendix D for sample pricing models and further explanation.)
5) HOPS should support flexible staffing models for chat reference (e.g. monitoring chat service from home.)

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Appendix A

Patron User Survey

1. Did you experience any technical problems that interfered with the online reference service? (e.g. error messages, inability to see Web pages being sent, disconnect, couldn't connect) Yes.   No.   Please explain your yes/no answer:
2. How would you rate the quality of the response to your question? It was all the information I needed.   It was helpful, but not complete.   It was not helpful at all.
3. What did you like most about this service?
4. What did you like least about this service?
5. Were the service hours sufficient and/or convenient? Yes.   No.   Why
6. Have you used this service before?" with the choice of answers: Yes, here at UC Yes, elsewhere Yes, here and elsewhere No, this is my first time
7. Please indicate your status: Undergraduate student Graduate student Faculty Staff Non UC
8. How did you hear about this service? [text box]
9. Would you be interested in helping the us further evaluate the service? (This would involve either an online chat interview or online chat group discussion session.) Yes. (Be sure to include your e-mail address below.) No.

Appendix B

Chat Librarians' Survey

1. Are you on a UC campus that currently offers a chat reference service (other than the pilot)?
Yes No
2. Did you have experience staffing a chat reference service (UC or elsewhere) before the pilot?
Yes No
3. In general, the quality of service patron's received has been excellent.
Strongly Disagree - Somewhat Disagree - Neither Agree Nor Disagree - Somewhat Agree - Strongly Agree
My opinion:
4. Please rate the value of collaborating with other UC librarians through the chat pilot.
Not valuable at all - Somewhat valuable – Valuable - Very valuable
5. What was challenging about answering questions from patrons from other campuses?
6. What were your biggest problems during the pilot?
7. What would you recommend to resolve those problems?
8. What did you think was successful about the chat pilot?
9. What one thing would you change about the pilot and why?
10. Do you have any other comments?

Appendix C

Chat Reference Marketing Plan

Purpose
To create interest in and use of the collaborative pilot for chat reference service.

Target markets
Target markets include current library users, non-library users who are web savvy, and library staff.

Current library users are faculty and students (undergraduate and graduate) who currently use the library's (UC library's involved in the pilot) services either through the web site or by physically entering the building. [These individuals may use the services infrequently or those who are regular library patrons. I'm unsure about this sentence…maybe it's missing something?] Should the pilot be extended or should the service become permanent, this could include staff and the general public.

Non-library users are those faculty and students who for various reasons have not turned to the library for assistance with their research.

Library staff includes public services staff and library administration of the UC libraries involved in the pilot. It is necessary that all staff who may have questions about the service and also those who will be involved in marketing the service are fully informed about the usefulness of the service and about the ways to market it to the public.

Marketing Strategies

Branding
Each of the participating UC Libraries has individual brand names for the chat reference service. Unless a common name is selected, no uniform marketing campaign materials can be developed. However, each library can build on its individual identity by tailoring the marketing campaign. The individual library should use its brand when creating brochures, handouts, signs, and bookmarks, etc. that publicize chat reference in order to strengthen brand identity.

Marketing to target audiences
Presented below are suggested ways to target each audience. Although the marketing suggestions are presented in terms of which audience is thought to be most impacted by a strategy, it is expected that the marketing would impact people outside of the targets.

Current library users
Current library users can be reached through the following channels.
- Each participating library should add a chat reference logo and link to their library web site entry page and if possible, add the link to every library page in the area used for help or for general site navigation (upper right corner).
- Perhaps we could recommend it also get into the OPAC navigation?
- Place desktop shortcuts on computers in the library, as well as on laptops you may lend to patrons, and if possible, on computers in computer labs across campuses.
- Place links to the service through subscription databases, including UC-eLinks.
- Departmental liaisons should promote the service when meeting with faculty, to encourage use by the faculty and for the faculty to promote use to the students taught by the faculty.
- During instruction sessions, the librarians should mention chat reference as a way to get help.

Could new students be another category? We have had a lot of success marketing to students enrolled in our required writing course. They already have an integrated library assignment. We

also hand out Ask a Librarian pens (and magnets) to each of them.

Non-library web savvy users
Non-library web savvy users can be reached through the following channels.
- Information on the service should be included in print and online library newsletters and customized press releases for campus newspapers.
- Place flyers in dorms and across campus
- Place table tents in cafeterias
- Talk up the service to fraternities and sororities and other campus organizations that have study groups
- Tell the campus tour guides to mention the service (assuming tour is to incoming students)

Library staff
Library staff can be reached through the following channels.
- Information on the service should be included in print and online library newsletters
- Information about the pilot should be presented at staff meetings (both library wide and departmental). If time permits, a demonstration of the service should be provided. At a minimum, staff should be aware of the time the pilot will occur, the goals and expected benefits of the pilot, and the campuses involved.

Evaluating marketing effectiveness

In the survey for those who have used the service, a question should be asked how the person heard of the service.

Appendix D

Question Point – 24/7 Reference software pricing models

The new Question Point – 24/7 Reference pricing model uses the following terminology:

Base Management Environment:
Subscribing to the Base Management Environment (BME) provides a group or library with access to the entire range of reference management tools available as part of the QuestionPoint package, including: email management, web forms, chat software, local knowledge base, access to the global knowledge base, and access to the Global Reference Network (GRN). A library and its Service Unit Profile(s) are associated with a Base Management Environment. Alternatively, a group of libraries could share access to the BME's cooperative tools including the group's knowledge base and chat queues.

Service unit profile:
Service unit profile equates to a discreet entry point on your website. If you want to have statistics, policy information, links, scripted messages, email, webforms, etc. that relate to specific libraries, branches, or subjects, you need a service unit profile for each discrete entity. For example, a cooperative of 10 libraries could share a BME but would need a Service Unit profile for each library.
(http://www.questionpoint.org/community/TransitionTaskForce/FAQ_rev4.htm#iii2)

The specific costs are:

- $3500.00 for each Base Management Environment
- $750.00 for each Service Unit Profile when you purchase 1-5, however, individual Service Unit Profiles cost less when you purchase in bulk: 6-10 at $500.00 per, 11+ at $350.00 per.
- $4000.00 for a local co-browsing server which would allow the library to offer co-browsing into licensed resources.
- OCLC member libraries receive a 5% discount, however, this discount is not calculated in the following scenarios.

Sample Scenarios:

Scenario 1: CDL negotiates a UC-wide contract with Question Point – 24/7 Reference (OCLC) and manages the co-browsing server.

This model presumes that every UC campus will eventually participate in a collaborative chat reference service.

$3500.00: 1 Base Management Environment
$5000.00: 10 Service Unit Profiles
$4000.00: 1 co-browsing server that is housed at CDL. CDL would manage this server so each UC campus would be able to co-browse into their licensed resources.

$12,500.00 divided between 10 libraries ($1250 per library)

Scenario 2: CDL negotiates a UC-wide contract with Question Point – 24/7 Reference (OCLC) without the co-browsing server.

This model presumes that every UC campus will eventually participate in a collaborative chat reference service. It does not include a co-browsing server, therefore, a campus will be identified to host the co-browsing service. The librarians will have to restrict their co-browsing to the licensed resources available to the patron being helped. This is how we provided service during our pilot. There are pros and cons, but it is a successful service model.

(e.g. There were times when the patron's campus had the subscription to a particular online journal, but UCI did not. Since UCI hosted the co-browsing server, the patron could only co-browse into journals owned by UCI.)

$3500.00: 1 Base Management Environment
$5000.00: 10 Service Unit Profiles
$ 00.00: No co-browsing server costs since both UCI and UCLA own them already and could host the service.

$8500.00 divided between 10 libraries ($850.00 per library)

Scenario 3: The UC campuses who chose begin providing collaborative chat reference for all of their service hours.

For example, UCI, UCLA and UCSB could join together to offer a collaborative chat reference service for all of their existing service hours (additional libraries could be added for the cost of an additional Service Unit Profile.) Again, it does not include a co-browsing server, therefore, a campus will be identified to host the co-browsing service. The librarians will have to restrict their co-browsing to the licensed resources available to the patron being helped.

$3500.00: 1 Base Management Environment
$2250.00: 3 Service Unit Profiles
$ 00.00: No co-browsing server costs since both UCI and UCLA own them already and could host the service.

$5750.00 divided between 3 libraries ($1917.00 per library)

Scenario 4: Each UC campus who chooses will negotiate their own collaborative chat reference software subscription locally and participate in an evening collaborative service (6p.m. – 9p.m.)

In this model, all campuses who chose to do so would collaborate to provide an evening chat reference service (part 1). Then each campus would decide whether or not to invest in a co-browsing server (part 2). Each campus choosing to staff an independent chat reference service apart from the evening collaborative would need at least their own Base Management Environment and Service Unit Profile, but a co-browsing server is optional.

Part 1) The evening collaborative service would require:

$3500.00: 1 Base Management Environment
$??: The number would depend on how many UC libraries choose to participate in the evening collaborative. ($750.00 for each Service Unit Profile when you purchase 1-5, however, individual Service Unit Profiles cost less when you purchase in bulk: 6-10 at $500.00 per, 11+ at $350.00 per.)

Part 2) Optional, depending on whether an individual campus chooses to provide an independent chat reference service during the day:

 a. Campus subscription with a co-browsing server and an independent chat reference service:
  $3500.00: 1 Base Management Environment
  $ 750.00: 1 Service Unit Profile
  $4000.00: 1 co-browsing server

  $8250.00

 b. Campus subscription without a co-browsing server and an independent chat reference service:
  $3500.00: 1 Base Management Environment
  $ 750.00: 1 Service Unit Profile

  $4250.00